DSHs ADRC expansion plan

Sample Letter of Agreement and MOUs between Washington’s Aging & Disability Resource Connection (ADRC) Program and Other Entities

# DSHS Partnerships

## Types of Agreements

### *Partnerships within the Washington State Department of Social & Health Services (DSHS) Aging & Disability Services Administration (ADSA)*

Within ADSA, services are tied together through regulations, policies, and procedures, especially in terms of Medicaid services. The division directors and unit chiefs meet on a regular basis to coordinate cross-division efforts. Additional work is underway to educate programmatic and direct service staff about ADRCs. The Governor and DSHS Secretary have both expressed their support for ADRC development and expansion. As a result, rather than establishing written ADRC agreements within ADSA, the strategy will be to publish the ADRC standards and work with directors, office chiefs and regional administrators to establish policies and procedures for coordinated intra-ADSA cross-referrals, cross-training, and follow-up; as well as other areas that may come up over time. The following segments of the Washington State Department of Social and Health Services (DSHS) ADSA will be targeted:

* Home & Community Services (HCS) Division
* Division of Behavioral Health and Recovery
* Division of Developmental Disabilities (DDD)
* Residential Care Services Division

### *Partnerships within DSHS (other than ADSA)*

It is anticipated that rather than developing memoranda of understanding with other DSHS Administrations or their divisions, the ADRC program will solicit and discuss letters of agreement. By virtue of being more generalized and less bureaucratic, they would promote dialogue on how best to foster local ADRC partnerships to improve service access and client satisfaction. Examples of DSHS Administrations where this might be useful include but are not limited to:

* Children’s Administration
* Division of Vocational Rehabilitation
* Economic Services Administration
* Juvenile Rehabilitation Administration
* Office of Indian Policy
* Office of Diversity and Inclusion
* Office of Deaf and Hard of Hearing
* Office of Emergency Management
* Planning, Performance and Accountability

## Sample Letter of Agreement

**Washington State Aging & Disability Resource Connection**

*A Project of DSHS-Aging & Disability Services Administration*

**ADSA State Level Letter of Agreement**

1. **Parties:**
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. **Purpose**

The purpose of this Letter of Agreement (MOA) is to promote cooperation and coordination among state and local ADSA divisional staff in order to improve the customer experience in understanding and accessing public and private-pay home and community-based or other long term supports and services.

1. **Scope of Agreement**

Collectively the parties agree as follows:

1. Continue to facilitate dialogue in order to promote, encourage, and support the
development and sustainability of the ADRC system in Washington State
2. Evaluate processes and outcomes; and support the creation of opportunities for expansion of ADRC services and supports, particularly where service gaps exist.
3. Provide advice for the development of timelines and goals leading to an integrated,
sustainable, point of entry system for older adults and persons with disabilities, regardless of age or socio-economic circumstances.
4. Promote local cross-communications, understanding, training, and effective partnership development.
5. **Effective Date**

This Letter of Agreement shall become effective upon signing and will continue unless otherwise changed in writing and agreed upon by all parties as represented by below signatures.

1. **Signatures**

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# STATE-LEVEL PARTNERSHIPS

## Types of Agreements

A Memorandum of Understanding (MOU) can serve as the basis for a partnership between an ADRC and state-level partners. The types of partnerships where an MOU may be appropriate include:

### *Partnerships with Other Washington State Agencies or Entities (Not Including DSHS)*

These include, but are not limited to:

* Healthcare Authority (HCA): the State Medicaid Agency
* Office of the Insurance Commissioner, Statewide Health Insurance and Benefits Advisors
* Department of Transportation: Agency Council on Coordinated Transportation
* Department of Veterans Affairs
* Department of Employment Security
* Washington State Deparmtment of Commerce
* Department of Early Learning
* Department of Services for the Blind
* Department of Health
* Center for Childhood Deafness and hearing Loss
* Department of Commerce
* Governor’s Committee on Disability Issues and Employment
* Human Rights Commission
* Department of Labor and Industries
* Department of Retirement Systems

## Note: an ADSA/HCA agreement is currently being forged and we will review opportunities for inclusion of ADRC components.

### *Partnerships with Agencies/Organizations that have Statewide Coverage*

These are entities that either serve individuals also served by ADRCs or share in wanting to improve access to LTSS. They include, but are not limited to:

* 211*info* and WIN 211
* Qualis Health
* Washington’s Traumatic Brain Injury Hotline
* Healthcare associations (e.g. hospital association, Aging Services of WA, etc)
* ARC of Washington
* Disease-specific associations (e.g. Alzheimer’s Association)
* Private-pay service provider associations (e.g. Western Region Geriatric Care Management)
* Developmental Disabilities Council
* PAVE - Family to Family
* NAMI – Washington (National Alliance of Mental Illness
* Childcare Resource & Referral
* Parent Trust for Washington Children
* Social Security Administration
* Veterans Administration

### *Partnerships with statewide Advocacy/Membership Groups*

These include, but are not limited to:

* Disability Rights of Washington
* Developmental Disabilities Council
* State Long Term Ombudsman Program
* Respite and Crisis Care Coalition of Washington
* People First (developmental disability advocacy groups
* Self Advocates of WA
* Senior Lobby of Washington
* Association of Independent Living Centers in Washington
* AARP

## Sample Memorandum of Understanding for State-Level Partners

## Memorandum of Understanding Between [State-level Partner] and the Washington State Aging and Disability Resource Center (ADRC)

### I. Purpose

The purpose of this Memorandum of Understanding is to promote cooperation, coordination, and enhance the provision of services to ensure older adults and persons with disabilities, regardless of age, are served in the most efficient and expedient manner by and between the signing parties. The parties will work together to promote and sustain long-term care services, as well as facilitate coordination at the local level.

### II. Parties

The parties involved in this agreement are:

* [State-level Partner]
* Washington State DSHS Aging and Disability Services Admininstration, Home & Community Services

### III. Operating Principles

The parties hold a shared vision of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

*[Example of shared vision: “establishing a coordinated ADRC function by implementing processes that allow options in the access to publicly and privately funded long-term services and supports to Washingtonians in need of these services.”]*

The goals of the parties include:

* \_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_

### IV. Organizational Needs

The ADRCs organizational needs include:

* \_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_

The [State-level Partner]’s organizational needs include:

* \_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_

[Add statement on designation of lead organization in specific situations]

### V. Methods of Cooperation

[Clarify areas of agreement and expectations for cooperation]

### VI. Scope of Agreement (example list)

The [State-level partner] and the ADRC program agree as follows:

1. To abide by the Health Insurance Privacy Portability and Accountability Act (HIPAA) and any other relevant state/federal requirements.
2. Data sharing for service and reporting (as possible)
3. Sharing information between parties regarding services, activities, and contacts
4. Share and coordinate policies and protocols around providing referrals and/or assistance
5. Promote the establishment of local partnership agreements
6. Work with local entities to provide and accept referrals of individuals for the purpose of assessment of needs and/or service delivery
7. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### VII. Period of Review

### This MOU will be officially renewed in \_\_\_\_\_\_.

### Amendments may be considered and enacted based on the consensus of the parties .

### VIII. Legal Effect

[Notation that the MOUS not legally binding if that is the case.]

### IX. Termination

### Either party may terminate this agreement with \_\_\_\_\_\_ [period of time] written notice with or without cause.

### X . Allocations of Funds

[If funds are involved, how parties will decide on allocation.]

### XI. Notices

[Names, contact information of individuals requiring notice if the MOU changes, need review or is terminated.]

### XII. Signatures

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### XIII. Appendices

### [Information necessary for execution of the MOU - i.e. staff roles and contact information, branch office information, meeting schedules, cross-training plan, etc.]

# local SERvice providers

A Memorandum of Understanding (MOU) can serve as the basis for a partnership between an ADRC and Local Service Providers. Some key local service providers include, but are not limited to:

* Centers for Independent Living (CILs)
* Regional 211 call centers
* Local DSHS Offices (HCS, DD, Children’s, CSOs)
* Regional Support Networks
* Community-based behavioral health
* Local healthcare providers (e.g. hospitals, clinics)
* County-based DD providers
* Community and Senior Centers
* Legal Service organizations
* Disease-specific organizations
* Language and cultural specific service providers
* Nutrition providers
* Health Department
* Employment Security and/or Employment One-Stop
* Senior Community Service Employment Program
* Local TBI Resource Manager
* Child Resource and Referral
* Kinship Navigator

## Sample Memorandum of Understanding for Local Service Providers

## Memorandum of Understanding Between [Local Service Provider] and the Washington State Aging and Disability Resource Center (ADRC)

### I. Purpose

The purpose for this Memorandum of Understanding (MOU) is to recognize the interconnected and complementary nature of the services provided by the Aging and Disabilities Resource Connection (ADRC) and {Local Service Provider] to define the roles, responsibilities, and procedures for collaboration between the ADRC and [Local Service Provider].

### II. Parties

The parties involved in this agreement are:

* [Local Service Provider]
* Washington State Aging and Disability Resource Center

### III. Operating Principles

The parties hold a shared vision of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

*[Example of shared vision: “establishing a coordinated ADRC function by implementing processes that allow options in the access to publicly and privately funded long-term services and supports to Washingtonians in need of these services.”]*

The goals of the parties include:

* \_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_

### IV. Organizational Needs

The ADRCs organizational needs include:

* \_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_

The [Local Service Provider]’s organizational needs include:

* \_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_

### V. Methods of Cooperation

[Clarify areas of agreement and expectations for cooperation]

### VI. Scope of Agreement

The [State-level partner] and the ADRC program agree as follows:

#### Referrals for Service

**The [Local Service Provider] will refer customers to the ADRC for services such as:**

* Information and assistance where ADRC services can complement or augment those provided by [Local Service Provider]
* Options counseling and decision support about and for service and support options, including: long-term service and support options: private or public-pay; in-home or community-based residential; and Federal, state, and local benefit programs
* Assistance to access long term services and supports, including functional/financial pre-screening one-on-one application assistance for public LTSS, and follow-up .
* Care Transitions
* Care Coordination
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [Any other ADRC service that may benefit the consumer]

**The ADRC will refer customers to the [Local Service Provider] for services such as (list of specific functions of the local service provider):**

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Where the same or similar services are provided by an agency other than [Local Service Provider], the ADRC shall act in the best interest of the customer and shall be under no obligation to make exclusive referrals to [Local Service Provider] or [Local Service Provider]-related vendor.

#### Cross Training and Information Sharing

* The [Local Service Provider] and ADRC will provide information about and train one another on their respective services and philosophies. [Local Service Provider] will identify the services for which it charges a fee, to either the customer or the agency, and provide this information to the ADRC.
* The [Local Service Provider] and ADRC will share information regarding services, providers and resources to assist in maintaining and updating their respective resource databases.
* The [Local Service Provider] and ADRC will share information regarding unmet needs of people with disabilities.
* The [Local Service Provider] and ADRC will share information about staff and consumer training opportunities

#### Collaborate on Marketing and Outreach

The ADRC and [Local Service Provider] will collaborate on marketing, outreach, and community events for elders and people with disabilities.

### VII. Period of Review

### This MOU will be officially renewed in \_\_\_\_\_\_.

### Amendments may be considered and enacted based on the consensus of the parties .

### VIII. Legal Effect

[Notation that the MOUs are not legally binding if that is the case.]

### IX. Termination

### Either party may terminate this agreement with \_\_\_\_\_\_ [period of time] written notice with or without cause.

### X . Allocations of Funds

[If funds are involved, how parties will decide on allocation.]

### XI. Notices

[Names, contact information of individuals requiring notice if the MOU changes, need review or is terminated.]

### XII. Signatures

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### XIII. Appendices

## [Information necessary for execution of the MOU - i.e. staff roles and contact information, branch office information, meeting schedules, cross-training plan, etc.]